

---

# REQUEST FOR PROPOSALS

To provide

STUDENT HOUSING  
TURNKEY DEVELOPMENT SERVICES

Requested by

**UWM REAL ESTATE FOUNDATION**

May 16, 2008

Proposal Due: June 27, 2008  
3:00 PM, CDT

---



## TABLE OF CONTENTS

<b>1</b>	<b>BACKGROUND .....</b>	<b>1</b>
1.1	Objective .....	1
1.2	University of Wisconsin – Milwaukee .....	1
1.3	Existing Housing.....	2
<b>2</b>	<b>PROJECT DESCRIPTION .....</b>	<b>3</b>
2.1	Overview .....	3
2.2	Scope of Work.....	3
2.3	Program Summary .....	4
<b>3</b>	<b>TERMS AND CONDITIONS.....</b>	<b>8</b>
3.1	General Provisions .....	8
3.2	Insurance Requirements .....	10
3.3	Terms of Agreement .....	10
<b>4</b>	<b>SELECTION PROCESS.....</b>	<b>12</b>
4.1	Overview .....	12
4.2	Advisory and Selection Committees .....	12
4.3	Schedule .....	13
4.4	Process Requirements.....	13
4.5	Minimum Qualifications .....	16
4.6	Evaluation of Proposals .....	16
<b>5</b>	<b>SUBMISSION REQUIREMENTS .....</b>	<b>19</b>
5.1	Organization of Response.....	19
5.2	Cover Letter.....	19
5.3	Table of Contents .....	19
5.4	Approach to Project.....	19
5.5	Developer Qualifications .....	20
5.6	Design Team Qualifications .....	21
5.7	Contractor Qualifications.....	22
5.8	Project Site .....	23
5.9	Supplemental Information .....	24



## 1 BACKGROUND

### 1.1 Objective

The University of Wisconsin – Milwaukee Real Estate Foundation (“UWMREF” or “Foundation”) is seeking proposals from qualified development firms (the ‘Developer’ or ‘Respondent’) to provide comprehensive turnkey development services for a new student housing facility on a site provided by the Developer (the “Project”). The site shall accommodate 500 to 700 lower-division students in suite-style units. Upon project completion and commissioning, the Foundation will purchase the Project from the Developer at an agreed-upon price.

The objective of this Request for Proposals (RFP) is to select a Developer with (1) demonstrated experience in designing and constructing student housing, and (2) control of a desirable site for the Project. An advisory committee will prequalify the Respondents’ submission of a suitable site and the Foundation’s Board of Directors will make the final selection based on the qualifications of the Developer and the attractiveness of the proposed site.

Developers are encouraged to organize teams in the most effective manner necessary to fulfill the scope of work. The team shall include firms necessary to provide services for all phases of the project. All legal structures permitted in the State of Wisconsin will be considered including a sole proprietorship, a partnership, a joint venture, a limited liability corporation, or a corporation.

### 1.2 University of Wisconsin – Milwaukee

The University of Wisconsin – Milwaukee (‘UWM’ or the ‘University’) is a four-year institution in the University of Wisconsin System with an enrollment exceeding 29,000. UWM offers a world of intellectual, social, and personal possibilities. UWM features:

- More than 120 undergraduate majors and sub majors, 49 master's programs, one specialist degree, and 21 doctoral programs.
- 12 schools and colleges.
- More than 3,000 different courses, including evening and off-campus classes.
- Faculty members who are nationally recognized for research and publication and are active citizens of the metropolitan community.
- A community of about 29,000 students, 1,349 faculty and instructional staff, and nearly 2,000 staff members.
- Accreditation as a comprehensive doctoral and research campus by the North Central Association of Colleges and Schools.

UWM was established in 1956 with the merger of Wisconsin State College, Milwaukee, and the University of Wisconsin Extension Center in Milwaukee. Since then, UWM has become a major part of the intellectual, cultural, and economic life of Southeastern Wisconsin.

UWM's 93-acre campus is located on Milwaukee's upper East Side, one of the city's most attractive residential areas and home to many faculty, staff, and students. UWM also is just a



short walk from historic Lake Park and the beautiful Lake Michigan shoreline. The campus, an attractive combination of historic buildings and modern architecture, is a short drive or bus ride from a wealth of cultural and recreational resources, including the Milwaukee Art Museum, Milwaukee Public Museum, Milwaukee County Zoo, theaters, concert halls, stores, restaurants, parks, professional sports events, and ethnic festivals.

### **1.3 Existing Housing**

On-campus housing serves 3,000 students in Sandburg Halls, Purin Hall, and Kenilworth Square. In January 2008, RiverView Residence Hall opened, housing approximately 475 students.

Sandburg Halls is a four-tower complex that houses 2,700 students in 3- and 4-room suites, each with their own bathroom. The complex includes a cafeteria, fitness center, coffee shop and a second-run movie theater. Purin Hall, located on the corner of Downer and Kenwood, offers housing to approximately 50 students in apartment-style suites. The newly developed Kenilworth Square is home to 373 upper-class, graduate, and older students in 1-, 2-, and 3-bedroom apartments.



## 2 PROJECT DESCRIPTION

### 2.1 Overview

The Foundation is seeking a Developer to enter into a turnkey development agreement for planning, design, financing, and construction of the Project. As described in Section 1.1 and further detailed in Section 4, a Developer will be selected through a two-step process. The Foundation will enter into an agreement with the selected Developer per the requirements of the scope of work set forth below and establish an acceptable time frame for completion of the work.

### 2.2 Scope of Work

The scope of work is divided into two parts. The services provided in Part A consist of pre-design consulting services, which will help the Foundation finalize the architectural program for the project, the project development budget, and the schedule. If the outcome of Part A yields a student housing project that the Foundation determines to be marketable, financially feasible, and sustainable, the Foundation will enter into an agreement with the Developer that will include design, construction, and financing of the facility.

Although it is anticipated that the Foundation will proceed with Part B of the Development Phase, it may cancel the relationship rather than proceed with design, construction, and financing. If this occurs through no fault of the Developer, expenses incurred by the Developer in Part A shall be reimbursed by the Foundation.

Respondents should be aware that in order to take advantage of significant cost savings available through tax exempt bond financing and sales tax exemptions, the Foundation may prefer to acquire a fully entitled site and then own and finance the construction of the improvements through completion. Under such a structure, the Foundation would consider engaging a Respondent to perform construction management, construction administration or owner's representation services. Each Respondent should be prepared to discuss the foregoing arrangement should the Foundation favor the Respondent site.

#### 2.2.1 Pre-Design (Part A)

As part of the Part A scope of work, the Developer shall:

- Assist the Foundation in the development and preparation of the Project program. The program will include budget and time requirements, space requirements and relationships, and outline construction specifications.
- Evaluate the site with regard to access, traffic, drainage, parking, building placement, and other considerations affecting the building, the environment and energy use, as well as information regarding all applicable governmental laws, regulations, and requirements. The Developer shall provide a current survey and geotechnical reports as necessary to support the preliminary design concepts, budget, and construction schedule.



- Provide a preliminary schedule for the Foundation's approval. The schedule shall show activities of the Developer and the Foundation necessary to meet the Foundation's completion requirements.
- Prepare for the Foundation's approval an estimate of the total development cost of the Project including construction costs, furniture, fixtures, and equipment, soft costs, contingency, and financing costs. If the estimate exceeds the Foundation's budget, the Developer shall make recommendations to bring the Project within budget.
- Prepare and submit for the Foundation's approval schematic design documents based upon the preliminary evaluation discussed above. The Developer shall also submit a statement of the proposed contract price, a final schedule for the construction of the Project, a financial pro forma for the Project, and any other information necessary to complete Part B of the agreement. Preliminary design documents shall include conceptual drawings, outline specifications, and other documents to fully describe the size, quality, and character of the facility, architectural, structural, mechanical, and electrical systems, and the materials proposed for the project.

## 2.2.2 Design/Build (Part B)

As part of the Part B scope of work, the Developer shall:

- Provide all services necessary to design and construct the project in accordance with the selected Part A proposal as described in Section 2.2.1, as modified by this Request and other modifications agreed to by the Foundation.
- Based on the preliminary plan, develop and submit design development and construction documents for review and approval by the Foundation.
- Commit to build the project for an agreed upon guaranteed maximum price and guaranteed delivery date.
- Be responsible for obtaining all necessary regulatory and jurisdictional approvals and entitlements.
- Construct the Project in accordance with the construction documents previously approved by the Foundation.
- Provide construction financing for the Project and assist the Foundation with obtaining permanent take-out financing at the completion of the work.

## 2.3 Program Summary

### 2.3.1 Objectives

The University has a substantial inventory of existing student housing beds. However, it recognizes the need for additional housing capacity, as well as satisfying the evolving preferences of freshmen and sophomore students. To meet the needs of the University and its students, the development of housing must meet the following objectives:

- Increase the supply of affordable housing for 500 to 700 lower-division students



- Provide living/learning opportunities through the inclusion of classrooms and academic support space
- Leverage UWM renewable energy initiatives
- Provide educational and research opportunities through green building design
- Deliver the new housing by August 1, 2010 in the most efficient and cost-effective manner

Other than the number and type of students it wishes to accommodate, the University has not developed detailed program requirements for the Project. This task will be undertaken in the Part A scope of work as described in Section 2.2.1. The program overview set forth in the following sections provides an outline description of the desired elements of the program, which must be balanced against the need for the project to be financially self-sustaining.

### 2.3.2 Building Program

The residential areas of the Project will include the following components:

- Single and double bedroom units for two to four residents; some units will have living areas (i.e., suites), which are desirable for returning students
- Semi-private bathrooms within the units that accommodate no more than two students per bath
- Staff units for (1) a full-time Resident Director, (2) a graduate student Assistant Resident Director, and (3) Resident Assistants (1:45 ratio)
- Common areas on residential floors that provide opportunities for student socialization in a semi-independent living environment; such spaces may include kitchens, active and quiet lounges
- Building common areas including a lobby/security area, laundry facilities, bicycle storage racks, mailboxes for letters and packages, storage space for students, vending space, trash/recycling rooms, etc.
- Support areas including telecommunication closets, electrical and mechanical rooms, trash collection area, custodial and maintenance staff areas, etc.

It is highly desirable to include a robust living/learning component in the program for the Project. The degree to which the desired spaces can be included will depend on the proximity of the site to campus, the number of students in the facility, and financial constraints. The University has identified the following spaces as desirable to enhance living learning opportunities for residents:

- Small group meeting spaces
- Classrooms
- Music practice rooms
- Multi-media learning and creativity center
- Offices for staff and student hall government/organizations



### 2.3.3 Site Design

The University would like to maximize the number of beds on the site consistent with sound planning principles, zoning regulations, and the creation of a quality living environment for the students. Site design shall consider the following requirements.

- Building placement to take full advantage of views and sustainable environmental opportunities
- Relation of new buildings to the scale of the neighborhood and existing structures
- On-site parking adequate to meet the needs of residents (0.15 spaces per bed) and housing management staff; parking areas should be safe and secure with lighting that exceeds code, and should incorporate other security measures to include fencing, electronic access, etc.
- Landscaping and hardscape to promote outdoor social and recreational activities
- Availability and capacity of utilities
- Emergency access/egress and service access

### 2.3.4 Security

Safety is a paramount concern for the Project. The Project must be constructed taking into highest consideration all student safety issues. Specifically, the Project shall include the following enhancements.

- Staffed 24-hour front desk
- Card access at exterior entries and crucial doorways throughout the building fully compatible with the University's security system
- Fire exits alarmed and electro-magnetically secured and monitored remotely
- CCTV cameras at lobby area, each elevator and all other critical areas

### 2.3.5 Sustainable Development Strategies

The Foundation views the Project as an opportunity to show its commitment to environmentally responsible design and construction, while balancing such values with economic constraints. Accordingly, the Developer shall demonstrate support of Foundation programs in these areas. As an example, the design and construction may consider the following opportunities:

- Storm-water management that includes porous paving, rain gardens, minimized hardscape, and preserved open spaces
- Native landscaping materials, shade trees, organic garden, none requiring irrigation
- Mitigation of light pollution through intentional lighting strategies
- Maximized day-lighting and views
- High efficiency plumbing fixtures
- Passive solar domestic hot water system



STUDENT HOUSING  
TURNKEY DEVELOPMENT SERVICES

Date Due: **JUNE 27, 2008**

Time Due: **3:00 PM CDT**

---

- Sub-floor radiant heat
- Construction waste management plan
- Recycled and locally manufactured materials
- Occupancy/daylight sensors
- Recycling and composting areas



## **3 TERMS AND CONDITIONS**

### **3.1 General Provisions**

#### **3.1.1 Revisions to the RFP**

The Foundation may modify this RFP prior to the date fixed for submission thereof by issuance of an addendum or addenda to all parties who have received a copy of the RFP. The Foundation may extend the deadline for Proposal submission if, in the Foundation's judgment, the revisions make this necessary.

Written inquiries concerning this RFP will be submitted to the Foundation by the date specified in Section 4.3 herein. Responses to inquiries will be made in writing and provided to all parties. The Foundation may decline to answer any Respondent's inquiries, in its sole discretion.

#### **3.1.2 Cancellation of the RFP**

The Foundation may cancel this solicitation, in whole or in part, or reject all Proposals submitted in response to this RFP when this action is determined to be in the best interest of the Foundation.

#### **3.1.3 Acceptance of Submittals**

The Foundation reserves the right to accept or reject any or all Proposals, in whole or in part, received as a result of this RFP; to waive minor irregularities; or to negotiate with all Respondents, in any manner necessary, to serve the best interest of the Foundation and the University. Further, the Foundation reserves the right to make a whole award, multiple awards, a partial award, or no award at all.

Nothing in this RFP shall be interpreted or construed as creating any contractual relationship, agency, or partnership between the Respondent and the Foundation.

#### **3.1.4 Incurred Expenses**

Any costs incurred by the Respondent in preparing and submitting a Proposal to this RFP will be the sole responsibility of the Respondent and will not be reimbursed by the Foundation.

#### **3.1.5 Economy of Preparations**

Proposals should provide a straightforward, concise description of the Respondent's ability to fulfill the requirements of this solicitation.

#### **3.1.6 Discrepancies and Clarifications**

The Foundation reserves the right to request clarification of any aspect of received Proposals or to request additional information that might be required to evaluate the Proposal(s). Pro-



posals that are incomplete or conditioned or are not in conformity with this RFP may be rejected.

### **3.1.7 Respondent's Responsibilities**

The Respondent is responsible for thoroughly reading the RFP and the terms and conditions contained therein. No pleas of ignorance on the part of the Respondent will be accepted by the Foundation. Each Respondent is solely responsible for the accuracy and completeness of its Proposal.

The Respondent will be required to bring to the attention of the Foundation expressly, in writing, any substitution, or change proposed to this RFP and the resulting contract documents. The Foundation will not be bound to a substitution or change unless the Respondent expressly brings it to the Foundation's attention, in writing, and the Foundation expressly approves the substitution or change, in writing. The Foundation reserves the right to reject any requested substitutions or change.

### **3.1.8 Confidentiality of Proposals**

Written requests for confidentiality shall be submitted with the Proposal. The request must state specifically what elements of the Proposal are to be considered confidential and/or proprietary. Confidential and proprietary information must be readily identified, marked and separated/packaged from the rest of the Proposal. Co-mingling of confidential and proprietary information and other information is unacceptable. Neither a Proposal, in its entirety, nor proposal price information will be considered confidential and proprietary.

### **3.1.9 Ethics in Contracting/Collusion**

Respondent will certify in its Proposal that its response is made without collusion or fraud and that the Respondent has not offered or received any kickbacks or inducements from any other Respondent, supplier, manufacturer, or subcontractor in connection with their Proposal, and that Respondent has not conferred on any trustee, officer, or employee of the University or Foundation, past or present, any payment, loan, subscription, advance deposit, travel services or items even of nominal value, present or promised.

### **3.1.10 Release of Information and Advertising**

The successful Respondent will not, without the prior written consent of the Foundation: (a) make any news release, public announcement, denial or confirmation of all or any part of the subject matter of this RFP or any resulting agreement, or any phase of any program hereunder; or (b) in any manner advertise or publish the fact that the Foundation has entered into a contract, or is a customer of the successful Respondent.

### **3.1.11 Nondiscrimination**

UWM and the Foundation support the principles of equal opportunity and will not discriminate because of gender, race, color, national origin, religion, sexual orientation, age or disability in the selection of firms.



## 3.2 Insurance Requirements

The Respondent will, at its own expense, procure and maintain during the entire performance period of any contract or agreement resultant from the RFP process as outlined in this Section 4, including any extensions thereof, insurance of at least the kind set forth below in the minimum amounts specified below.

- Comprehensive General Liability insurance including completed operations and contractual liability in an amount of not less than \$10 million per occurrence and name the Foundation and the University as an additional insured.
- Professional Liability insurance (Error and Omissions) covering the design services under the agreement in an amount not less than \$1 million per occurrence and \$2 million in the aggregate.
- Builders' Risk insurance including all standard coverage specifically providing coverage for exposed buildings and structures.
- Comprehensive Automobile insurance in an amount of not less than \$1 million per occurrence, which will cover all autos, owned and non-owned, hired and leased.
- Workers' Compensation and Employers Liability—statutory requirements for all occupational injuries, illness, and disease.

All insurance coverage will be written by companies licensed or authorized to do business in the State of Wisconsin and having an A.M. Best rating of A or better. All policies, except Workers' Compensation, will provide a 30-day notice for cancellation, and shall name the Foundation and the University as additional insured. Certificates of Insurance evidencing coverage will be provided to the Foundation prior to the awarding of any contract.

## 3.3 Terms of Agreement

The terms of the Development Agreement will be negotiated with the successful Respondent; however, the Foundation will require the inclusion of the following terms in the final agreement

### 3.3.1 Negotiations

After Foundation selection and approval of a Developer, the Foundation and the Developer must enter into an agreement satisfactory to the Foundation within sixty (60) days. If the Foundation and the selected Developer fail to reach agreement within the sixty (60) day negotiation period, the Foundation shall have the exclusive right to extend the time frame, cancel further negotiations, or begin negotiations with other developers.

### 3.3.2 General

- **Performance Benchmarks:** All contracts and agreements will contain time and performance benchmarks, including construction deadlines, as appropriate, with clear termination provisions.
- **Indemnification:** The successful Respondent and its agents, partners, employees and consultants ('Indemnitors') shall defend, indemnify and hold harmless the Foundation,



the State of Wisconsin and their officers, employees and agents from and against all liability, loss, damage, liens, causes of action, suits, judgments, cost, and expense, including all attorneys' fees, and all claims, suits, and demands therefore, arising out of or resulting from the performance of services or any part thereof, the acts or omissions of the Indemnitors, or sub-contractors under any agreement with the Foundation.

- **Insurance:** The Respondent will provide proof of insurance at levels acceptable to the Foundation prior to the signing of a Development Agreement. Other insurance may be required from time to time in such amounts as may be determined by the Foundation for coverage against other insurable risks relating to performance.

### 3.3.3 Design and Construction

- **Assurances:** All contracts and agreements will include provisions for liquidated damages, performance bonds, or other remedies to assure timely completion of the Project. Prior to commencement of construction, the Respondent must demonstrate that it has the resources in hand or available to complete the project.
- **Design Standards:** Improvements shall be designed to comply with Foundation and city design standards.
- **Off-site and On-Site Costs:** All off-site and on-site preparation costs will be at the sole cost and expense of the Respondent. All residential and ancillary buildings, circulation, and landscaping for this Project are to be located within the Project site.
- **Construction Schedule:** The Project shall be fully completed and ready for occupancy no later than August 1, 2010.



## 4 SELECTION PROCESS

### 4.1 Overview

Selection of the successful Respondent will be based on the professional qualifications of the Respondent's team and the technical and financial attributes of the proposed site. The Foundation has chosen a "best value" selection process that will consider both qualitative and quantitative criteria. The Foundation has chosen the "best value" selection process combined with "design-build by developer" delivery strategy for the following reasons:

- The Foundation has not yet developed a definitive program or specifications for the Project, preferring to work with an experienced development team to accomplish this task.
- As a turnkey transaction, the cost and desirability of the site are key considerations in the selection of the Developer.
- The process must be able to accommodate the recommendations of the advisory committee and the final selection by the UWMREF board.
- The Foundation wants to assign the risk of planning, design, regulatory approvals, construction, and financing to a single legal entity (aka, the Developer)
- Time is of the essence for the selection of the Developer and the delivery of the Project by August 1, 2010.

To be successful, the Developer must be experienced in this type of project delivery method. In particular, the Foundation seeks teams that have:

- Management capabilities and current experience standard to the design-build industry
- Knowledge of the full range of real estate development activities including financing, land acquisition, entitlements, and transaction structuring
- Solid relationships with the architect and contractor on the team as demonstrated by successful experiences on prior projects.

### 4.2 Advisory and Selection Committees

A Student Housing Development Advisory Committee ("SHDAC") will pre-qualify all proposals received by the closing deadline. Specifically, the SHDAC will (1) evaluate the approach to the Project, (2) determine that the teams have met all minimum qualifications, and (3) determine the suitability of the site for development. The SHDAC will be comprised of one representative each from:

- Student Affairs
- Residence Hall Government (student)
- Campus Physical Environment Committee
- Academic Affairs
- Administrative Affairs



- UWM Real Estate Foundation

Those proposals deemed acceptable by the SHDAC will be fully evaluated by the UWMREF Board of Directors. In making the final selection, the Board will consider:

- Qualifications of the Developer's team, including its record for arranging financing for other projects
- Site plan, capacity, location, easements, and utilities
- Proof of site control including clarification of entitlements, liens, and taxes
- Site cost
- Any restrictions or impediments to development
- Funding sources and financial strength

Minimum requirements and the selection criteria are more fully described in Sections 4.5 Minimum Qualification and 4.6 Evaluation of Proposals.

### 4.3 Schedule

The Foundation expects to adhere to the following schedule in the selection process through project turnover:

- RFP distributed May 16, 2008
- Pre-proposal conference May 29, 2008
- Deadline for submission of questions June 13, 2008
- Deadline for submission of proposals 3:00 PM, June 27, 2008
- Oral presentations July 22, 2008
- Notification of successful Respondent July 25, 2008
- Contract negotiations August 2008
- Pre-Design Phase (Part A) September 2008 - December, 2008
- Design-Build Phase (Part B) January 2009 – June 2010
- Project Commissioning July 2010

This schedule is subject to modification at the sole and absolute discretion of the Foundation. For specific instructions relative to the Schedule, refer to the following sections.

### 4.4 Process Requirements

#### 4.4.1 Pre-Proposal Conference

A mandatory pre-proposal conference will be held on May 29, 2008 from 9:00 AM to Noon. The purpose of the pre-proposal conference is to formally introduce the project and key members of the UWMREF and the University, and to tour the existing student housing. The meeting also provides the opportunity for all parties to ascertain who may be participating and to seek clarifications about the requirements of the RFP.



The meeting will be held at the following location:

RiverView Residence Hall  
Second Floor Lounge / Dining Room  
2340 North Commerce Street  
Milwaukee, WI 53212

Enter the RiverView Hall parking garage at the south end of the building. Take the elevator to the second floor and follow the signs to the second floor Lounge/Dining Room.

#### 4.4.2 Inquiries

Inquiries concerning this RFP must be received in writing, original signed in ink by a representative of the Respondent, prior to the date specified in Section 4.3. An inquiry received by email or complete, legible facsimile of the original by the deadline will be deemed timely if a complying original is promptly received.

Except as specifically permitted in this section, from the date of this RFP until a final agreement is executed and the selection is announced, Respondents are not permitted to communicate for any reason with any University or Foundation representative or consultant except through:

Name: David Gilbert  
Title: President, UWM Foundation  
Address: 3230 East Kenwood Boulevard  
Milwaukee, WI 53201  
  
Phone: 414-906-4670  
Fax: 414-229-6963  
Email: [dhg@uwm.edu](mailto:dhg@uwm.edu)

In the event of a violation of this provision, the Foundation reserves the right to reject the proposal of the offending Respondent. Only questions that are in writing will be accepted. In addition, only responses issued in writing will be binding on the Foundation.

#### 4.4.3 Written Addenda

Response to inquiries will be made in writing and provided to all Respondents via email. The Foundation may decline to answer any Respondent's inquiries. The Foundation may modify this RFP, prior to the date fixed for submission of the proposals, by issuance of an addendum or addenda to all parties who have received a copy of the RFP.

#### 4.4.4 Format of Proposals

Proposals must be submitted in the format outlined in Section 5 of this RFP, with each of the described divisions completed in full. Each proposal will be reviewed to determine if it is complete prior to actual evaluation and the SHDAC or the UWMREF Board reserves the right to eliminate from further consideration any proposal deemed to be substantially or materially non-responsive to the requests for information contained herein.



A proposal may be considered non-responsive if it includes extraneous information not specifically requested in this RFP. The clarity and conciseness of responses will be valued over sheer volume.

Each division and exhibit described below must be indexed, tabbed, and presented on a separate page. If a Respondent fails to provide all categories of information required in this RFP, the Respondent may be disqualified from further award consideration. However, the Foundation reserves the right in its sole discretion to waive minor irregularities.

#### 4.4.5 Submission of Proposals

One (1) original and ten (10) copies of all proposals must be received no later than the due date and time set forth in Section 4.3 of this RFP unless amended pursuant to Section 4.4.3. The deadline for submission of RFPs may be extended if, in the sole judgment of the Foundation, such extension is warranted.

One (1) original and nine (9) copies of the responses will be sent to:

**UWM Real Estate Foundation**

Attn: David Gilbert  
3230 E. Kenwood Boulevard  
Milwaukee, WI 53211

One (1) copy of the response will be sent to:

**Anderson Strickler, LLC**

Attn: Gregory Strickler  
18310 Montgomery Village Ave., Suite 520  
Gaithersburg, MD 20879

The entire proposal must be in a sealed package. The name and address of the Respondent will appear on the outside of the package and the package will refer to UWM Student Housing. All addenda to the RFP must be signed and returned with the proposal.

Each Respondent is solely responsible for the timely delivery of its proposal by the deadline for submission. The Foundation will not be responsible for lack of timely delivery of a proposal regardless of reason. Failure to meet the deadline for submission of a proposal will result in rejection of the proposal.

#### 4.4.6 Oral Presentations

An oral presentation will be required of select Respondents submitting qualified proposals. The purposes of the oral presentations are as follows:

- To allow the Foundation to meet the Respondent's key personnel and seek clarifications
- To allow the Respondent to discuss selected aspects of its proposal

At the time of the oral presentations are scheduled, the Foundation will confirm by telephone and in writing with each Respondent the specifics of these sessions.



#### 4.4.7 Final Ranking and Selection

The Foundation may negotiate with all Respondent finalists before selecting an apparent successful Respondent. The selection of an apparent successful Respondent does not necessarily mean the Foundation accepts all aspects of the Respondent's Proposal.

After the initial selection of an apparent successful Respondent, should the Foundation fail to reach an agreement as to all points of the agreement, the Foundation may reject the Proposal, consider other Proposals, or undertake such other actions as deemed to be in the best interest of the University.

#### 4.5 Minimum Qualifications

The Developer's team shall meet the following minimum requirements. Failure to do so will result in the rejection of the submission and the removal of the Respondent from further consideration.

- **Developer:** The developer shall have successfully financed and completed projects of similar size and scope.
- **Architect:** The architect shall be licensed to do business in the State of Wisconsin and have designed projects of comparable size and scope.
- **Contractor:** The contractor shall be licensed to do business in the State of Wisconsin and have constructed projects of comparable size and scope.

#### 4.6 Evaluation of Proposals

The Foundation will perform a pre-qualification screening of the Proposals submitted by the deadline set forth in Section 4.3 to determine compliance with the administrative requirements set forth in Section 3 and the minimum qualifications set forth in Section 4.5. Proposals that do not meet these requirements will be removed from further consideration.

Following the initial screening, the SHDAC will review the conforming proposals to determine which are recommended for final consideration by the Foundation's Board of Directors and those that should be removed from further consideration. Proposals deemed acceptable will be forwarded to the Foundation for a complete review. Upon completion of its review, the Board will determine which Respondents to invite to make oral presentation of their proposals.

##### 4.6.1 Approach to Project

The Respondent's approach to the project will be evaluated based on the following criteria.

- Demonstration of a coordinated approach to the scope of work for the design and construction phases of the Project
- Involvement of the Foundation and the University in the review and approval of concept design and development of the construction documents



- Sensitivity to the issue of maximizing the value of the project by balancing the needs of the students (e.g., affordability, amenities, privacy) with the financial feasibility of the project (e.g., quality of construction, program)
- Demonstration of its ability to adhere to the project schedule for both the design and construction phases

#### **4.6.2 Developer Qualifications**

The qualifications of the developer will be evaluated based on the following criteria.

- Business expertise and management experience in comparable developments involving similar scope and services
- Organization of the Developer's team and interrelationship between entities if more than one firm is involved; prior experience of firms as team members in a design-build approach to project delivery
- Financial soundness
- Experience of Developer in the delivery of comparable turnkey and residential projects
- Ability to arrange for financing, and flexibility of terms and process for financing

#### **4.6.3 Design Team Qualifications**

The qualifications of the architect and other members of the design team will be evaluated based on the following criteria.

- Availability of professional staff and their qualifications and experience for assigned roles on the project
- Experience of the architect on comparable residential projects of similar size and scope, including both new construction and renovation
- Demonstrated LEED certification experience for residential facilities
- Financial soundness
- Ability of the architect to provide required insurance coverage

#### **4.6.4 Contractor Qualifications**

The qualifications of the contractor will be evaluated based on the following criteria.

- Availability of professional staff and their qualifications and experience for assigned role on the project
- Experience of the contractor on comparable residential projects of similar size and scope, including both new construction and renovation
- Financial soundness
- Ability of contractor to provide required insurance coverage and bonding capacity

#### **4.6.5 Project Site**

The Respondent's proposed site will be evaluated based on the following criteria.



STUDENT HOUSING  
TURNKEY DEVELOPMENT SERVICES

Date Due: **JUNE 27, 2008**

Time Due: **3:00 PM CDT**

---

- Suitability of the site for student housing (e.g., location, capacity, zoning, impediments)
- Proximity to County Transit System (MCTS) and current UWM shuttle system; proximity to main Kenwood Campus and other UWM student housing (RiverView and Kenilworth)
- Access to services and amenities for students in the neighborhood of the proposed site
- Degree of control of the site (e.g., ownership, under option)
- Status of entitlements, liens, and taxes
- Rezoning requirements and regulatory approvals
- Cost of the site, environmentally clean and inclusive of all entitlements



## **5 SUBMISSION REQUIREMENTS**

### **5.1 Organization of Response**

The response shall be submitted in three-ring loose leaf notebooks and organized as follows:

- Cover Letter
- Table of Contents
- Approach to the Project
- Developer Qualifications
- Design Team Qualifications
- Contractor Qualifications
- Project Site
- Attachments

### **5.2 Cover Letter**

A transmittal letter prepared on the Respondent's business stationery must accompany each response. An individual authorized to bind the firm to all statements, including all services contained in the response, must sign the letter.

### **5.3 Table of Contents**

The proposal shall have a Table of Contents that conforms to the organization set forth in Section 5.1.

### **5.4 Approach to Project**

#### **5.4.1 Team Organization**

An overview discussion of the Respondent's proposed approach to development is requested in order to ascertain the team's general expertise and capability to deliver the Project.

Submit a brief overview of the Respondent's approach to the Project. The summary should not exceed three (3) pages and should address the following topics:

- A demonstration of an understanding of the Project objectives
- An overview of the Respondent's organization and the entity or entities that will be responsible for the work
- A summary of the Respondent's basic experiences and attributes that set it apart from other candidates, including prior projects on which team members have worked together

The Respondent shall also provide a letter or memorandum of understanding signed by all team members identified that:

- Describes the proposed structure of Respondent's team



- Identifies the person (including contact information) authorized to represent the team in all communications and negotiations
- Certifies that all parties are willing and able to provide the services set forth in the RFP.

#### **5.4.2 Development**

Describe the Respondent's approach to performing the services set forth in Section 2.2 and necessary for the planning, design, construction and financing of the Project. The description should include a discussion of the methodology to be used by the Respondent for seeking Foundation and University input and periodic approvals of its work. The following issues are of particular interest to the University:

- Site analysis and entitlements
- Program development
- Foundation review and approval opportunities during design
- Budget and pro forma development and control
- Trade-off or approaches to value engineering
- Schedule control during design and construction
- Construction management

#### **5.4.3 Schedule**

Demonstrate the Respondent's capacity to meet the Project delivery date set forth in Section 4.3. Provide a schedule for achievement of all major Project milestones, including the following:

- Start and finish of pre-design planning (Part A)
- Start and finish of architectural and engineering design
- Procurement of all entitlements, permits, licenses, and approvals
- Start and finish of site development
- Start and finish of building construction, and
- Commissioning of the facility

### **5.5 Developer Qualifications**

#### **5.5.1 Personnel**

Provide resumes and references for personnel who will be representing the Developer on the project and who have provided technical skills on projects similar to that required in this Request. The qualifications of the Developer should also address the capability and the experience necessary to secure construction financing and tax-exempt financing, if determined to be needed for the Project.



## 5.5.2 Projects

Provide a list of projects of similar size and scope completed by the Developer. For each project, provide the following information:

- Project name
- Description of project including size and number of units or beds
- Picture of project, if available
- Total development budget and final cost
- Scheduled opening date and actual opening date
- References with telephone numbers

## 5.5.3 Financial Data

Provide the following financial information for the Developer:

- Most recent financial statement available (identify whether audited or un-audited) including balance sheet and income statement, including notes
- List of bank and accounting references
- Statement from insurance/surety brokers indicating that the requisite bonds and insurance can be secured for the Project

## 5.5.4 Claims, Law Suits or Defaults

Provide a list of any outstanding claims, lawsuits, or defaults on the part of the Respondent or any of its subsidiaries.

## 5.5.5 Tax-Exempt Financing

Provide information on experience in providing construction financing and tax-exempt financing and the availability of such financing for the proposed Project.

## 5.6 Design Team Qualifications

### 5.6.1 Personnel

Provide resumes and references for personnel who will be representing the architect and its sub-consultants on the Project who have provided technical skills on projects similar to that required in this Request.

### 5.6.2 Projects

Provide a list of at least three projects of similar size and scope completed by the architect. For each project, provide the following:

- Project name
- Description of project including size and number of units or beds
- Picture of project, if available



- Total development budget and final cost
- Scheduled opening date and actual opening date
- References with telephone numbers

### **5.6.3 Financial Data**

Provide the following financial information for the architect:

- Most recent financial statement available (identify whether audited or un-audited) including balance sheet and income statement, including notes
- List of bank and accounting references
- Proof of insurance in accordance with applicable requirements of Section 3.2

### **5.6.4 Claims, Law Suits or Defaults**

Provide a list of any outstanding claims, lawsuits, or defaults on the part of the architect or any of its subsidiaries.

## **5.7 Contractor Qualifications**

### **5.7.1 Personnel**

Provide resumes and references for personnel representing the contractor on the Project and who have provided technical skills on projects similar to that required in this Request.

### **5.7.2 Projects**

Provide a list of at least three projects of similar size and scope completed by the contractor. For each project, provide the following information:

- Project name
- Description of project including size and number of units or beds
- Picture of project, if available
- Total development budget and final cost
- Scheduled opening date and actual opening date
- References with telephone numbers

### **5.7.3 Financial Data**

Provide the following financial information for the contractor:

- Most recent financial statement available (identify whether audited or un-audited) including balance sheet and income statement, including notes
- List of bank and accounting references
- Proof of bonding capacity (payment and performance) for 100% of the project
- Proof of insurance in accordance with applicable requirements of Section 3.2.



#### 5.7.4 Claims, Law Suits or Defaults

Provide a list of any outstanding claims, lawsuits, or defaults on the part of the contractor or any of its subsidiaries.

### 5.8 Project Site

The Respondent shall provide a complete and detailed description of the Project site, potential development capacity, and cost in this section of the Proposal.

#### 5.8.1 Site Description

Provide a complete physical description of the site including:

- General site characteristics including location, parcel size, terrain, ease of development, proximity to the University, access to public transit, adjacent uses, and any other attributes that would be important for the development of student housing
- Location map, which includes both the site and the University
- Legal description of the parcel including a discussion of any easements or other encumbrances
- Boundary and topographic survey of the parcel
- List of studies with dates (e.g., geotechnical report) that have been performed and provide detailed information on the proposed site
- Discussion of the form of control of the property and any steps required to obtain a clear title that can be conveyed to the Foundation at project completion

#### 5.8.2 Program Evaluation

The Respondent shall provide an evaluation of the program that can be accommodated on the proposed site. Since the program for the project has not been finalized, certain assumptions must be established so that the Respondents can develop site proposals that are comparable. Respondents should assume a minimum of 500 beds of student housing in suite-style units. Since the specific unit types and distribution have not been determined, Respondents should allocate 325 gross square feet per bed which is inclusive of all common areas, support spaces, circulation, and unassigned spaces.

This analysis should address:

- Total bed capacity; alternative scenarios may be provided at various building heights
- Building footprint and height subject to applicable zoning restrictions and sound planning principles
- Parking requirements assuming a ratio of 0.15 cars per bed
- Pedestrian and vehicular circulation, access, and common open space, including courtyards, parks, plazas, and landscape buffers at the periphery
- Special requirements such as utility easements, rights-of-way, flood plain areas, storm-water retention features, and unbuildable slopes



The program summary should include a verbal discussion of the analysis and illustrative diagrams and a conceptual site plan.

### 5.8.3 Site Evaluation

The Respondent shall provide an evaluation of the physical, cultural, and regulatory factors that will impact the development of the site. Issues that should be addressed include:

#### **Physical Factors**

- Climate
- Topography
- Geotechnical/soils
- Utilities
- General services

#### **Cultural Factors**

- Site history
- Adjacent land uses
- Type of land ownership
- Location and type of pertinent community services

#### **Regulatory Factors**

- Zoning codes
- Jurisdictional requirements and approvals
- Building codes and requirements

For a complete discussion of site issues to consider in this analysis, *refer to The Architect's Handbook of Professional Practice, The American Institute of Architects, Section 2.4, Site Analysis.*

### 5.8.4 Land Price

Provide the total cost of the land ready to build. That is, the cost must include demolition of existing structures, hazardous materials remediation, and costs associated with obtaining clear title. Specify any exceptions or contingencies attached to the price.

## 5.9 Supplemental Information

This section shall be used for the presentation of supporting materials and information to the proposal. These materials should be kept to a reasonable minimum and provided only if they are in direct support of the Respondent's proposal.